Bocconi

IRIS INSTITUTIONAL RESEARCH INFORMATION SYSTEM

User manual <u>https://iris.unibocconi.it/</u>



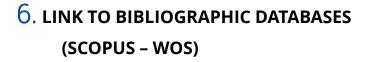
June 2019

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Università Bocconi DIVISIONE FACULTY E RICERCA

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7. UTILITY

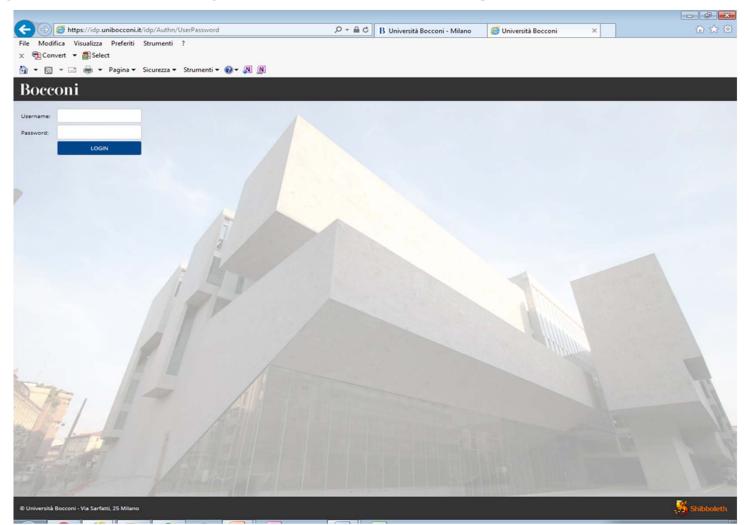
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Homepage – Login

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Use your university credentials to log in





Registration to ORCID

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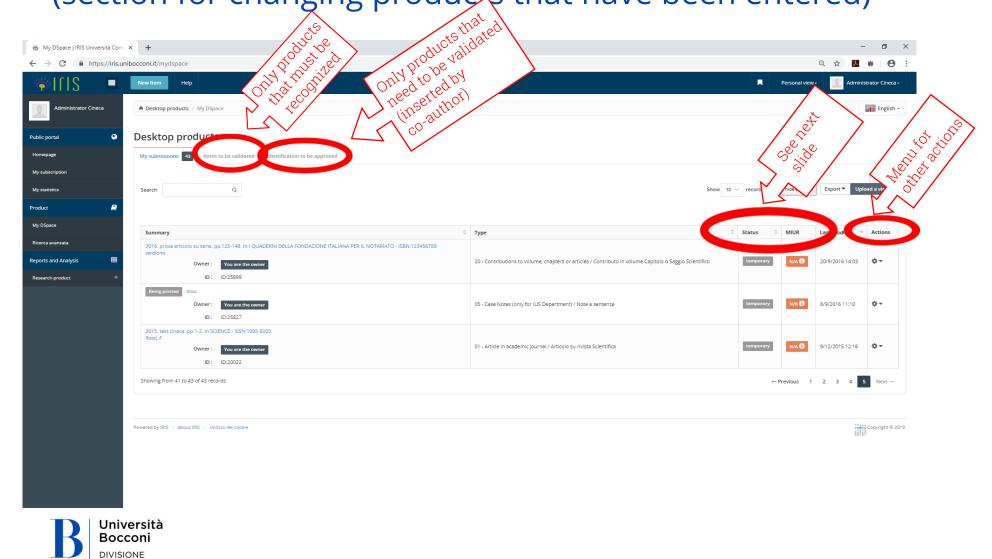
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View of personal products page (section for changing products that have been entered)



Recording and sending data to the MIUR Login faculty website statuses

STATUS = Recording status

The registration status is:

- provisional: when the author responsible for the data has completed entering data;
- in validation: when the author has completed entering data and registration must still be verified and approved by the librarian/operator;

definitive: status of old products that have not been validated;

validated: when entered data has been controlled and certified (validated) by the library;

- **reopened**: only for products "in validation" when the author makes changes using the "open" button available on the details sections but does not complete the operation.
 - → <u>Note on reopened status</u>: in order for the changes made by the author to replace the previous file on the public portal, the entire file must be completed through section 6 "License" by then clicking on complete.

MIUR = Status of recording delivery to MIUR Login faculty website (for Bocconi Faculty only)

The "status" of the recording regarding whether the publication has been sent to the faculty website is shown in the column. Possible statuses include:

"to (re)send": the product has been changed and needs to be (re)sent

"N/A" (Not Applicable): the product is in a provisional status or belongs to a type that is not mapped on MIUR (e.g. PhD dissertation)

"successful"

"error"

By clicking on ① in the sent to faculty website status, the system will show a pop-up with detailed information.



Adding new products (blue "new product" button in the top left)

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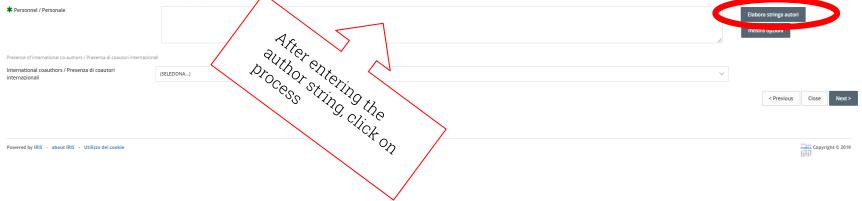


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Type or paste in the appropriate box below the names of the authors in their original format. Then click on the "Edit authors string" button, the system will process the typed string and present the authors: in green if recognized as internal to the university, in gray if external and in orange if it is necessary to disambiguate the recognized as internal author (if green) disambiguate turbas will also be automatically clouding on the single authors, internal and external) will be presented under this box with the possibility to integrate further information. *I* Digitare o incollare nell'apposito box stotstante i nomi degi autori nel formato originale. Successivamente clicare aut bottone "Elabora stringa autori", il sistema elaborari la stringa digitata e presenter di gilattone, in greto e stessivo disambiguare bi inconder this box with the possibility to integrate further information. *I* Digitare o incollare nell'apposito box stotstante i nomi degi autori nel formato originale. Successivamente clicare aut bottone "Elabora stringa autori", il sistema elaborari agi autori: a stringa digitata e presenteri gil autori: la mereficia e stringa digitata e presenteri di diutori e versione di conder e conscience in autori clicanto string" bittone clicanto sul singolo autore è possibile disconscere un autore interno (sed i colore verde), disambiguare più autori (se di colore earancione). Verrà inotre calcolato automaticamente il numero degil autori e verà presentata stoto a questo box una tabella degi autori interni ed esterni) con la possibilità di integrate autori.





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- **Pre-print**: original draft by the author, as sent in submission to the journal, not yet submitted to the peer review process, without formatting and paging by the editor
- **Post-print**: draft or author's accepted manuscript, final version of a publication after the peer review process, with any changes added and ready to be published, but without editorial formatting
- Editorial PDF: definitive version published by the editor, with paging, logo, graphics, etc.
- Abstract: abstract of journal articles
- Attachment for Bocconi evaluation: other ancillary document, that has not been edited, e.g. acceptance letter, etc.



5. ADDING NEW PRODUCTS

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Completing the form – screen 4.3. Access policy

The ACCESS POLICY defines who and how the document/file can be accessed on the IRIS public portal

- Open Access: select if published in the Open Access publications
- **Embargo**: select if published in publications with embargo (* after the embargo period indicated, automatically becomes Open Access)
- For archive managers only: select to allow access to archive managers only

Usually the access policy is included in the contract or license the author signs with the editor when publishing. The access policy is usually also included in the full text of the same or on the editor website. For journal publications, the Sherpa/RoMEO database integrated into IRIS may also be used (see slide 23)



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The LICENSE defines the permitted uses of the full text:

- Not public/restricted private access: all rights related to the publication were transferred to the editor when the publication contract was stipulated or reserved to the author: the full text cannot be made visible
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5. ADDING NEW PRODUCTS

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yellow	can archive pre-print (ie pre-refereeing)
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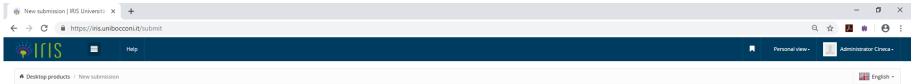
5.2. Recovering data from bibliographic external service

When adding products using this method, only the publication's main information is imported.

The file therefore remains provisional until all the required sections, marked with an * have been completed by the author.



5.2. a) free database search



New submission: get data from bibliographic external service

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5.2. b) search by ID

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cont. 5.2. c) importing from bibliographic files

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New submission: get data from bibliographic external service

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Creating a link between publications in IRIS and publications in SCOPUS and/or WOS

Recovering external IDs

In this section, a link can be created between publications in IRIS and publications in SCOPUS and/or WOS.

The match can be completed from IRIS by searching the respective databases using the metadata in the publications.

The link can be checked by viewing the publication in IRIS (clicking on the title) and in the WOS or SCOPUS database (by clicking on the appropriate icon). If the link is correct, click on the so icon, if it is not correct, click on the so icon. If the link is accepted, the related line will no longer appear on the list after the next page update.

In the "recognition mode" column, the algorithm used to recognize the publication can be identified. Green links are made through a unique ID, others through a match with the title or other metadata.

NB: This service is available only if the University has a subscription with the editor.



6. LINK TO BIBLIOGRAPHIC DATABASES (SCOPUS – WOS)

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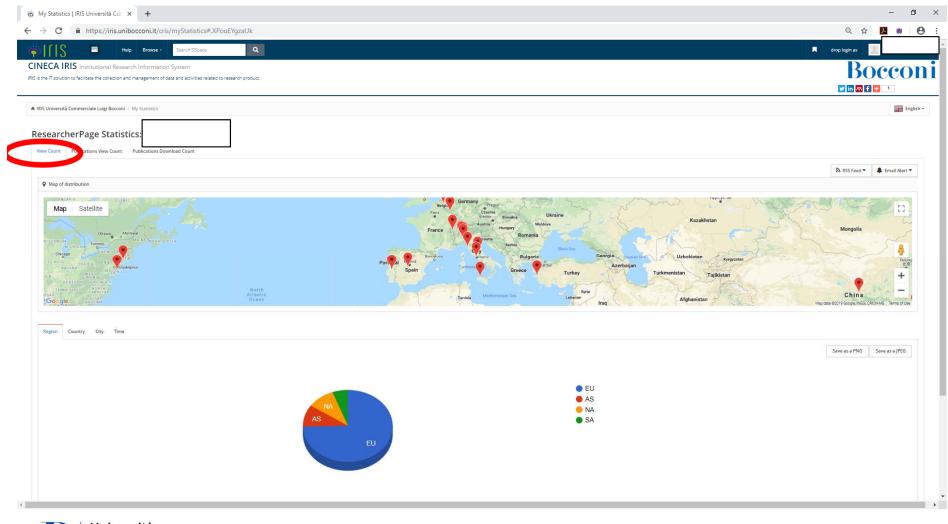


Utility: notifications and statistics

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Utility: statistics



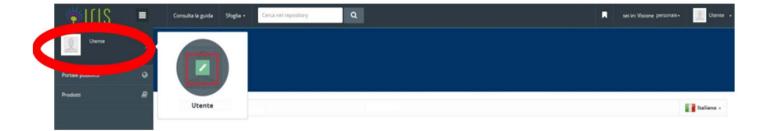
B Università Bocconi Divisione FACULTY E RICERCA

Push of products towards ORCID

Configurazione del proprio profilo

Una volta che si è in possesso di un account ORCID agganciato a IRIS, occorre configurare il proprio profilo per scegliere quali informazioni sincronizzare.

Per farlo occorre accedere in editing alla propria pagina di anagrafica cliccando sull'immagine del proprio profilo e quindi cliccando su edit (icona a forma di matita)



Quindi portarsi nel tab **Indicativi di servizi esterni**. Attraverso questa sezione è possibile decidere quali informazioni sincronizzare con ORCID.



Push of products towards ORCID

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FACULTY E RICERCA

Details on synchronizing publications

The synchronization process considers all a user's publications in the Definitive/Validated status.

The push occurs automatically by enabling Publication Synchronization in the External services indications tab on the user's personal page.

After they have been synchronized, the publications will appear in the ORCID personal account in the works section.

If IRIS appears in the source (e.g. <u>https://iris.xxxx.it/</u>) it means the product has been imported with the push procedure. Products imported from IRIS have citations in the Bibtex format. Citations are visible in the product details.

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Push of products towards ORCID

IRIS is currently able to synchronize

- publications
- personal data
- professional experience

For all three, the default setting is Disabled. That means that the user can decide which to enable by selecting Enabled from the drop-down menu and then clicking on the Save button at the bottom of the page.

Synchronization

Synchronization of information from IRIS to ORCID occurs automatically. This activity is managed by a batch performed daily at 9:00pm. The job takes into consideration the publications edited on the previous day. When fully operational, only the items that have been edited are synchronized. If only synchronization of publications is enabled, this will be triggered by the first change to an item. Later additions or changes will be managed incrementally.



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Pull of products towards IRIS

Like importing products from external databases, **Pull from ORCID** can be accessed by using IRIS with personal view, then going to **Products Desktop and clicking on New Product**.

In the next form, go to the Search by ID section (see slide 5.2. Adding products through importing through **Recovering data from external bibliography services** – **b) search by ID)**, then insert a valid ORCID ID in the corresponding form and click Search.

Based on the results, choose which to import by checking "Import" above each item.

The type of product to assign can be chosen through the drop-down menu next to each item.

Alternatively, all items can be imported by checking "Select all" and choosing just one type of document for all items through the corresponding drop-down menu.



Pull of products towards IRIS

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Pull of products towards IRIS

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THANKS.



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